

# **SUNS District User Guide**

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# Welcome

Read this document! It will tell you how to operate and maintain the district software for participating in the South Carolina Student Unique Numbering System (SUNS) project.

This document assumes you've already worked through the Installation Guide and installed your software, and that you've validated the installation using the Post-Install Checklist in the Installation Guide.

If you run into any problems while using SUNS, check this document first, before you call DTS.

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# What's Included

## Overview and Install Location

There are four district level components for SUNS: SIF Agent for SASIXP, Student Locator SIF Agent, SIFWorks ZIS, and Microsoft SQL Server Desktop Engine (MSDE). All of the files for these components and tools that support them are installed on your SUNS computer's hard drive in the directory you specify.

The default for this location is C:\SIFAgents but you may have specified a different location at install time. In addition to this User guide and the installation guide, there are several documents in Adobe Acrobat (PDF) files installed onto your SUNS computer's hard disk by the installation program. These files are the current (summer 2005) documentation set for the individual components, and are installed into the same directory structure as the software components.

## Starting and Stopping Services

Each of the SUNS components is installed as a Windows service; this means that the programs start up whenever the computer is powered on or restarted, without any user intervention and without anyone logging in to Windows. Occasionally, a troubleshooting document or technical support staff member may indicate that you should "stop" a service, and later on tell you to "start" it again.

To stop and start services, do the following:

**1. Log in to Windows using the sifuser account or another administrative account.**

It's usually best to log in as the sifuser account or whatever account you specified for use with SUNS when working with SUNS components. Many districts use the same account they use for task server administration.

**2. Open the Services program provided by Windows.**

The Services program is in different locations depending on which version of Windows the SUNS machine is running. Typically, it is in either the top level of Control Panel, or it is in the "Administrative Tools" folder within Control Panel.

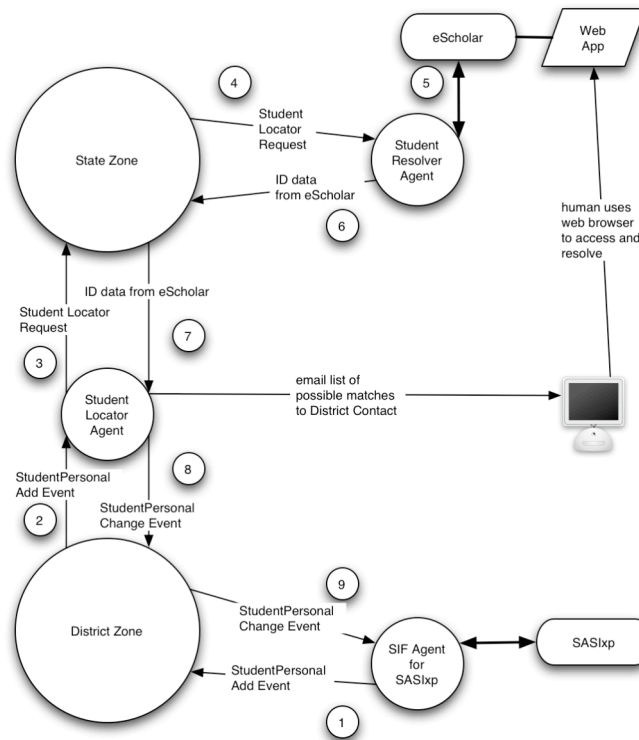
**3. In the list of services, select (highlight) the name of the service you wish to stop.**

**4. Double-click the service name to open its properties window.**

**5. In the service's properties window, do the following:**

- To stop a service that is running, click Stop.
- To start a service that is not running, click Start.
- To stop and restart a running service in one step, click Restart.
- To change whether the service starts at system boot time, change the Startup Type. In most cases this should be left at Automatic. Only change to Manual or Disabled as directed by a troubleshooting document or support person.

# How It Works



When you enroll a new student in SASIXp, the SASI SIF Agent (a component of SUNS) publishes that new student's information to the District Zone Integration Server (the ZIS, another SUNS component on your local machine). The ZIS sends the information to the Student Locator Agent, the third major component of SUNS on your local machine.

The Student Locator Agent is the component that communicates with the state office. The Student Locator Agent puts out a request on the State ZIS for a student ID. The State ZIS sends that request to the Student Resolver Agent.

The Student Resolver Agent formats the request for the Uniq-ID server, and one of three things happens:

- If the Uniq-ID server returns a single ID for the student (either an absolute match or a newly issued ID), the Student Resolver Agent sends that ID to the State ZIS, which gives it to the requesting Student Locator Agent (the one at your district's SUNS machine). The Student Locator Agent publishes the ID to the District ZIS, which sends it on to the SASIXp Agent. The SASIXp Agent then writes the ID into the SASIXp ALTID1 field.

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- If the Uniq-ID finds one or more “near-match” possibilities, it sends a message to the Student Resolver Agent indicating that fact. The message travels the same path back to the Student Locator Agent on your SUNS machine, which sends you an email notification. You then log in to the Uniq-ID web application and resolve the near matches. After you resolve the near match, the ID is automatically returned through the same path back to your SASIxp.
  - If an error occurs, the Student Locator Agent will send you an email notification so you can fix the errors and, if necessary, try again.

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# Operations

## Day-to-Day Operations

Generally, you won't use or even see the SUNS products in operation. As you add students to SASIxp, the SUNS tools will automatically send that student's information up to the state's SUNS server for issuance of a unique student identifier. After issuance, your local SUNS software will automatically insert that student identifier into SASIxp. Occasionally you will get an email indicating that you need to resolve a "Near Match" between two or more students, or to fix an error; resolving or fixing the situation will result in the appropriate student ID being automatically inserted into SASIxp.

## End of Year Rollover

In 2005, you should complete End of Year Rollover in SASIxp before installing SUNS. In future years, you will receive instructions on the procedure; instructions are also available in the SASIxp Agent documentation.


## Batch Mode

SUNS includes a "batch mode" that allows you to acquire IDs for all students in your school that don't already have them.

You should run Batch mode once a week or two after installation. Thereafter, you will not usually need to run Batch mode, but you can (for example, if you have formerly Inactive students who are now Active again, Batch mode is the way to get IDs for them).

The first time you run Batch mode, it can take up to several hours between one set of steps in the Batch Wizard. Subsequent batches should be significantly faster, but the first one you may wish to start one evening and finish the next day.

**1. Open the Student Locator Console from the Start menu**  
(Start --> Edustructures --> Student Locator --> Student Locator Console).

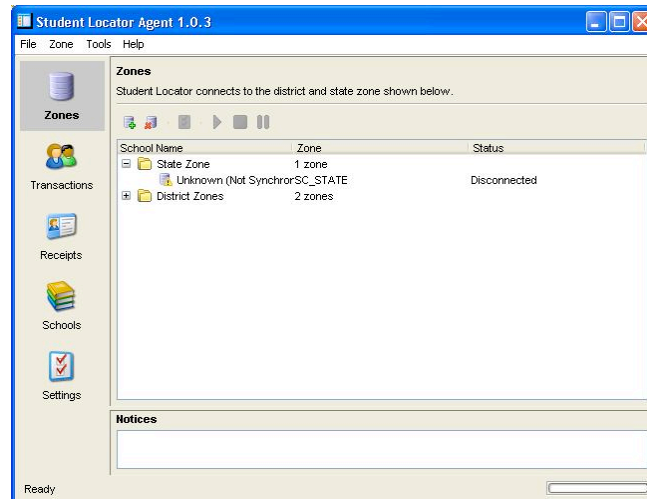
A small icon  is added to the "System Tray" at the lower right of your Windows desktop.

**2. Click the icon in the System Tray.**

You see the a message asking if you want to connect the console to the agent running "On this computer" or "On a remote computer", with the button for "On this computer" selected.

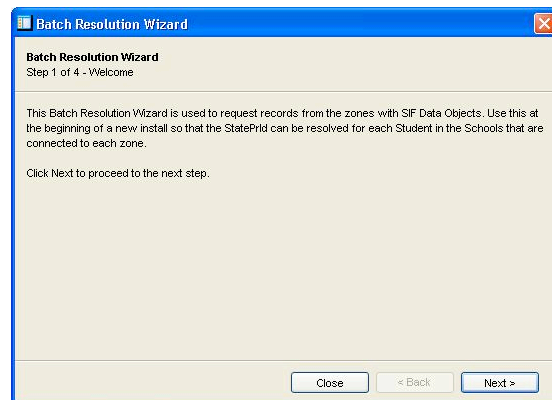
3. Leave the “On this computer” button selected and click Connect.

You see the Student Locator Agent console.



4. From the Tools menu in the Student Locator Console, select “Batch Resolution”.

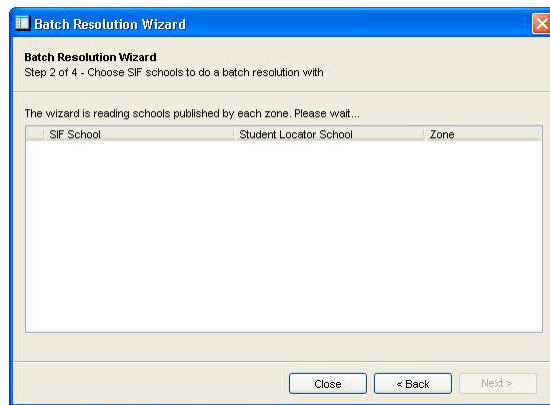
You see the first page of the Batch Resolution Wizard.



5. Click Next.

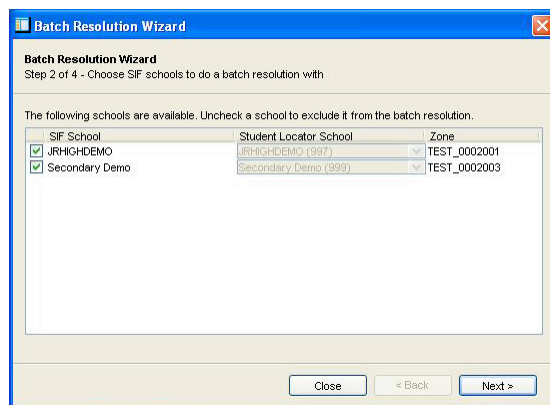
You see the second page of the Batch Resolution Wizard. At first it is empty as shown below; after a time it fills with a list of the schools in your district. Populating the list may take quite a long time, especially the first time you run a Batch Resolution.





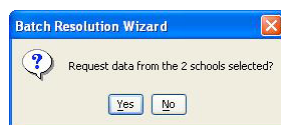
**6. When the list of schools has filled in, make sure the schools you want to include in the batch have the checkbox to the left marked.**

In the first batch you run you will want to have all marked; with later maintenance batches you'll have the option to limit the scope of the batch by selecting only specific schools.



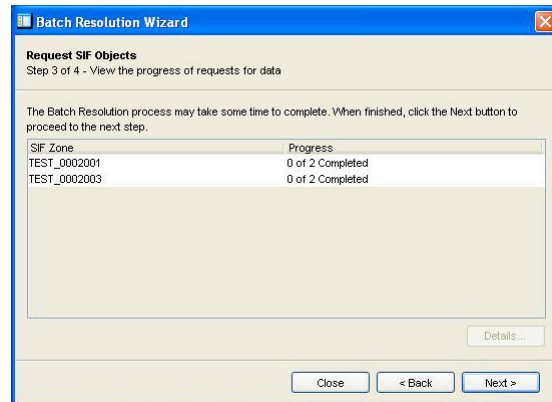
**7. When the schools you want are all marked, click Next.**

You see a window asking you to confirm that you want to request data from the selected schools.



**8. Click Yes.**

You see the third page of the Batch Resolution Wizard.

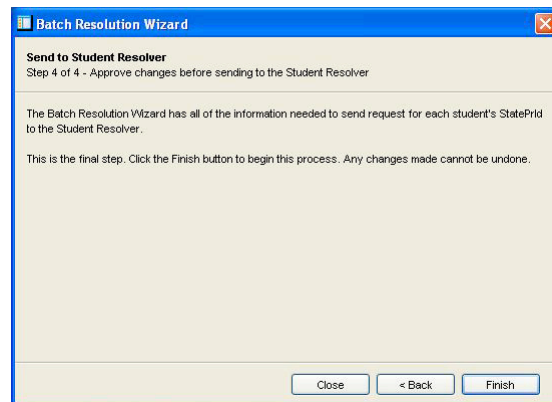


**9. The third page shows the progress as each selected school is queried for its students and other key information. You can move on when all schools listed are in the Done status.**

These queries take an especially long time the first time you run a batch. You may wish to let it run overnight.

**10. When all schools show “Done” status on the third page of the Batch Wizard, click Next.**

You see the fourth page of the Batch Resolution Wizard.




**11. Click Finish.**

The Batch Resolution Wizard sends student ID requests to the state for all students in the batch that don't already have valid state ID numbers recorded in SASI's AltID1 field.

## Tracking Progress

For both day-to-day operation and batch mode operation, SUNS provides several tools for tracking the progress of SIF unique ID requests. The basic tracking tool, and the easiest to use, is the Transactions pane of the Student Locator Console.

1. **Open the Student Locator Console from the Start menu**  
(Start --> Edustructures --> Student Locator --> Student Locator Console).

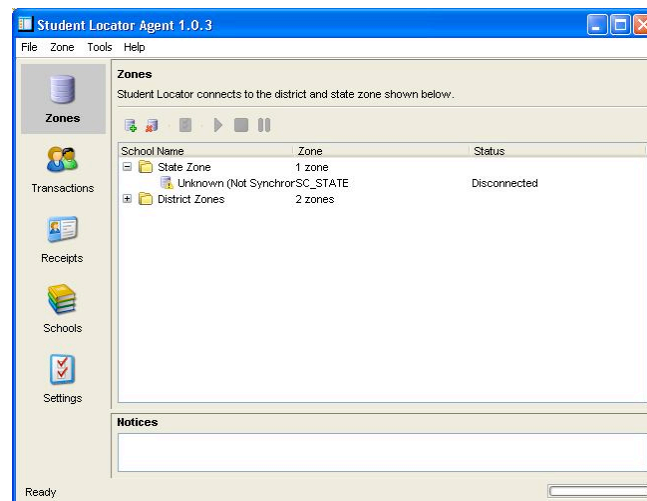
A small icon  is added to the “System Tray” at the lower right of your Windows desktop.

2. **Click the icon in the System Tray.**

You see the a message asking if you want to connect the console to the agent running “On this computer” or “On a remote computer”, with the button for “On this computer” selected.

3. **Leave the “On this computer” button selected and click Connect.**

You see the Student Locator Agent console.



4. **Click the Transactions icon at the left of the window.**

You see a list of students for whom IDs have been requested. Each student’s status is shown. If an ID has been issued that too is shown. You can limit the list by using the Status pop-down menu; changing this menu limits the display to only student records in the specified status.


## Checking General Connectivity

If at any point you are concerned about the health of your system, start with the Post-Install Checklist in the Installation Guide before moving on to other diagnostics or calling technical support. If your system fails to pass the Checklist, note that fact when you call DTS.

## Email Configuration

By default, notifications go to one email account for the entire district. To change that account or specify individual accounts for each school, do the following:

1. **Open the Student Locator Console from the Start menu (Start --> Edustructures --> Student Locator --> Student Locator Console).**

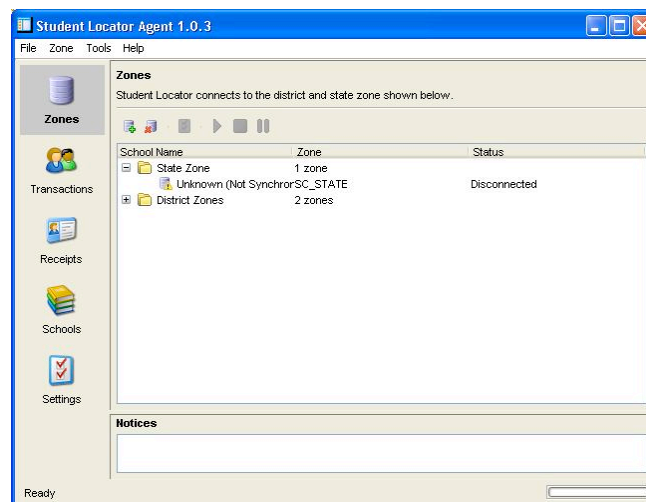
A small icon  is added to the "System Tray" at the lower right of your Windows desktop.

2. **Click the icon in the System Tray.**

You see the a message asking if you want to connect the console to the agent running "On this computer" or "On a remote computer", with the button for "On this computer" selected.

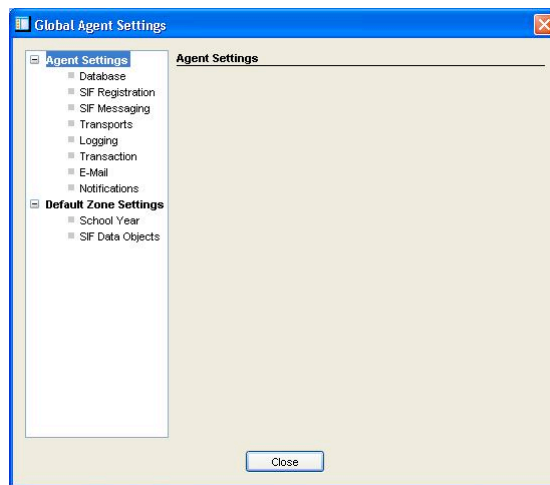
3. **Leave the "On this computer" button selected and click Connect.**

You see the Student Locator Agent console.



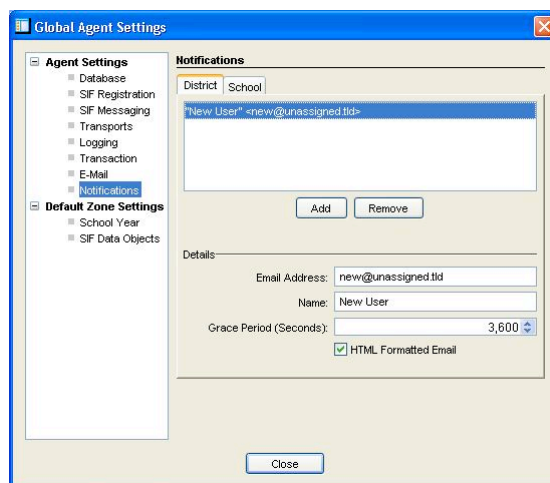
4. **From the File menu in the Student Locator Console, select "Agent Settings".**

You see the Agent Settings window.



5. In the left panel of the Agent Settings window, click on Notifications.

You see the Notifications panel.



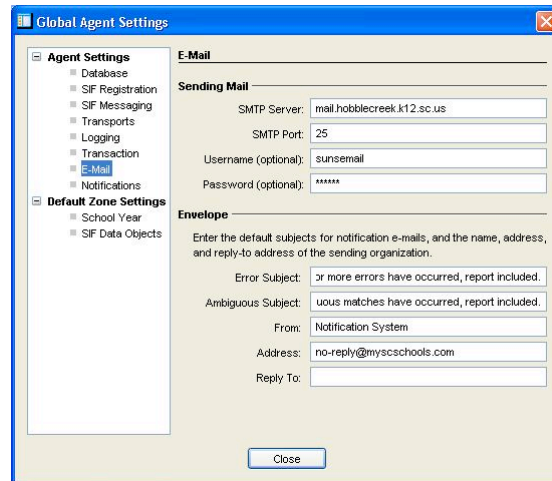
By default it shows you the District level notification settings.

- To add an email recipient, click Add. An entry called “New User” appears in the list.
- Highlight “New User” and the information under Details will become editable.
- Edit the “Details Information” to reflect the correct address, name, and grace period (time between emailings—a smaller number means more frequent emails with fewer students in them, while a larger number means less frequent email notifications).
- To see the listing update, click Add again or click Close and then reopen the Notifications settings.

To add a recipient for a single school, click the School tab and then enter a recipient in the same way. Under Details, specify the school by entering its 3-digit SASIXp number in the School field.

**6. In the left panel of the Agent Settings window, click on E-Mail.**

You see the E-Mail panel.

The screenshot shows the 'Global Agent Settings' window with the 'E-Mail' tab selected. The left sidebar contains a tree view with 'Agent Settings' expanded, showing sub-items like Database, SIF Registration, SIF Messaging, Transports, Logging, Transaction, E-Mail (selected), and Notifications. Below this is 'Default Zone Settings' with 'School Year' and 'SIF Data Objects'. The main area is titled 'E-Mail' and contains two sections: 'Sending Mail' and 'Envelope'. 'Sending Mail' has fields for SMTP Server (mail.hobblecreek.k12.sc.us), SMTP Port (25), Username (optional) (sunsemail), and Password (optional) (masked with asterisks). 'Envelope' has a text area for default subjects, and fields for Error Subject (3 or more errors have occurred, report included), Ambiguous Subject (duplicates matches have occurred, report included), From (Notification System), Address (no-reply@myschools.com), and Reply To (empty). A 'Close' button is at the bottom.

**7. Make sure a valid server, port, email username and password are entered.**

The username and password can be any account that has sending rights on the email server. They may or may not be related to your network accounts, depending on how your system is set up. We recommend use of a sending account that is not any person's individual account, so that if people leave the SUNS system will not depend on their email accounts remaining active.

**8. When you are finished making changes, click Close.**

You are returned to the Student Locator Console.

## Backup

You should back up the SUNS folder regularly (by default this folder is C:\SIFAgents).